

2/22/2011

**EXAMPLE Documentation
for New Home Final
Ratings**

Assigned with Preliminary fund allocation and follows through with Final

From as Constructed Quick Analysis

Directly from Final 2005 EPACT Energy Efficiency Home Tax Credit Report

On New Home Final Ratings...there MUST be a Rated Property Address provided... NO LOT NUMBERS

If check being mailed to rated property address check same...if not fill out address where check will be mailed to

Only change if info has changed from the time of Preliminary rating...If changed you must resubmit a new W9 reflecting these changes (Info from W9)

Empower Louisiana
National Network of State & Local Governments

HERO Cover Sheet New Homes

CO # 123456

1 Open Application/14 Day Funds Obligation

Rated Property: City **New Orleans**, Zip **70126**
 Street Address: **123 Example Street**, City **New Orleans**, State **Louisiana**, Zip **70126**
 Parcel: **Orleans**

Rater/Auditor: **123-45-6789**
 Rater SSN/VIN: **Joe Rater**
 Rater Name: **Joe Rater**
 Rater Ph. #: **504-111-1111**
 Rater email: **joe_rater@haha.find**
 Applicant Mailing Address (for rebate check)
 Applicant Name: **Joe Smith**
 Applicant ID #: **987-65-4321**
 Applicant ID #: **504-222-2222**
 Mailing address same as above: ☐

2 Preliminary Rating / 6 Month Obligation

Date: **1/24/08**
 HERS Score for Builder's Challenge: **62** (must be ≤ 70)
 Tax Credit Level: **50% Target**
 Heating: **5.4** (must be ≥ 2.9)
 Cooling: **14.4** (must be ≥ 15.2)
 Total: **19.9** (must be ≥ 18.1)
 Meets Builders Challenge: **YES**
 Meets Fed Tax Credit: **YES**

3 FINAL Rating

Date: **1/24/08**
 HERS Score for Builder's Challenge: **62** (must be ≤ 70)
 Tax Credit Level: **50% Target**
 Heating: **5.4** (must be ≥ 2.9)
 Cooling: **14.4** (must be ≥ 15.2)
 Total: **19.9** (must be ≥ 18.1)
 Meets Builders Challenge: **YES**
 Meets Fed Tax Credit: **YES**

HERO Cover Sheet

Required Documents:

Document	Prep	Final
HERO Cover Sheet	✓	✓
W-9	✓	✓
Form 1119	✓	✓
Tax Letter	✓	✓
New ENERGY STAR® HVAC Equipment Form	✓	✓
New NON-ENERGY STAR® HVAC Equipment Form	✓	✓
SHPO Form	✓	✓
Foundation Certification	✓	✓
REURate BLD Files	✓	✓
Economic Summary	✓	✓
Home Tax Credit Report	✓	✓
Energy Cost and Features Report	✓	✓
Quick Analysis Report for As-Built and Proposed	✓	✓
Performance Summary of as Built compared to IECC 2004	✓	✓
Notes	✓	✓

Version 1-13-2011

This information comes from Performance Summary of the as built home compared to an IECC 2004 home (Energy Savings of the as Built Home over a Home built to the 2004 IECC...see p.6 of this document) ... CARRY OUT TO AT LEAST 1 DECIMAL PLACE...

2 bldg files = Home From Plans & As Built

List of all documents submitted with a New Home Final

Energy Rated Homes of Louisiana

certifies that th

Joe Smith

has been rated using the Uniform Energy Rating System

HERO
Form 1119

Always 100 on a New Home
(a 100 point home meets the 2004 IECC)

Quick Analysis of Final
As Constructed Home

Rated Property

Zip **70126**
City **New Orleans**
State **Louisiana**
Street **123 Example Street**
Parish **Orleans**

Program and Rating Status

Program ☒ New Homes ☐ Existing Homes

Rating Status ☐ Preliminary² ☒ Final

Rating / Energy Cost

HERS Rating	Estimated Annual Energy Costs*	Estimated Annual Savings*
100	\$1,215	\$877
NA		\$338

less efficient	200-151	150-101	100-91	90-86	85-71	70 or less	more efficient
	★★★	★★★★+	★★★★+	★★★★+	★★★★+	★★★★+	

Suggested Improvement Options

Suggested Improvement Options	Existing Values	Proposed Option	Actual
Ceiling Insulation	R30		R30
Wall Insulation	R30		R30
Floor Insulation	DbL/LowE/Vyn		DbL/LowE/Arg/Vyn
Windows			
Air Leakage	.92 EF		.92 EF
Duct Leakage	3000cfm@50		3000cfm@50
Water Heater	8.5 HSPF		9.3 HSPF
Air Leakage	14 SEER		17.5 SEER
Heating Equipment			
Cooling Equipment			
Other			
Total Package			

From Final
Economic Summary

From Preliminary
Economic Summary

HERO Certified Energy Rater

Name

Joe Rater

Signature

Joe Rater 1/24/08

Date

Home Owner

Name

Joe Smith

Signature¹

Joe Smith

Date

1/24/08



of Louisiana

LA Dept of Natural Resources

Notes: Savings total for individual efficiency measures may not equal the value of the features combined together. Every effort has been made to provide accurate information on this form based on the professional judgement of the Energy Rater at the time of the rating. No warranty as to specific energy performance is expressed or implied by the information on this form. 1. Owner signature required only for final rating. 2. Preliminary rating for New Homes must be done from building plans.

From Final Energy Cost
& Feature Report

QUICK ANALYSIS REPORT

Date:	April 16, 2010	Rating No.:	
Building Name:		Rating Org.:	
Owner's Name:	Joe Smith	Phone No.:	987-654-3210
Property:	123 Example Street	Rater's Name:	Joe Rater
Address:	New Orleans, LA 70126	Rater's No.:	ERHL 2000-026
Builder's Name:	Eddie Beard, LLC		
Weather Site:	New Orleans, LA	Rating Type:	Confirmed Rating
File Name:	E.Beard4045AthisCtBLGF.big	Rating Date:	1-24-08

Codes

IECC 2009 Performance:	Passes
IECC 2006 Performance:	Passes
IECC 2004 Performance:	Passes
IECC 2003 Performance:	Passes
IECC 2001 Performance:	Passes
IECC 2000 Performance:	Passes
IECC 1998 Performance:	Passes
ECC of NY Performance:	Passes
ECC of NV Performance:	Passes
MEC 1995 Performance:	Passes
MEC 1993 Performance:	Passes
MEC 1992 Performance:	Passes
ASHRAE 90.2 Performance:	Passes

Programs

EPA ENERGY STAR	Passes
Tax Credit	Passes
HERS Index	62

**Final Rating Score/Index of
as Constructed Home**



2005 EPACT ENERGY EFFICIENT HOME TAX CREDIT

Date:	April 16, 2010	Rating No.:	
Building Name:		Rating Org.:	I
Owner's Name:	Joe Smith	Phone No.:	987-654-3210
Property:	123 Example Street	Rater's Name:	Joe Rater
Address:	New Orleans, LA 70126	Rater's No.:	ERHL 2000-026
Builder's Name:	Eddie Beard, LLC		
Weather Site:	New Orleans, LA	Rating Type:	Confirmed Rating
File Name:	E.Beard4045AthisCtBLGF.blg	Rating Date:	1-24-08

Normalized, Modified End-Use Loads (MMBtu/year)

	2004 IECC 50% Target	As Designed
Heating:	5.4	2.9
Cooling:	14.4	15.2
Total:	19.9	18.1

Information transferred
to Cover Sheet

Envelope Loads (MMBtu/year)

	2004 IECC 90% Target	As Designed
Heating:	9.8	3.5
Cooling:	25.9	23.6
Total:	35.7	27.1

This home MEETS the requirements for the residential energy efficiency tax credits under Section 1332, Credit for Construction of New Energy Efficient Homes, of the Energy Policy Act of 2005.

As demonstrated above, this dwelling unit has a projected level of annual heating and cooling energy consumption that is at least 50% below the annual level of heating cooling energy consumption of a reference dwelling in the same climate zone, and the building envelope components improvements alone account for at least 10% of those savings. The projected heating and cooling energy savings above have been calculated in the manner prescribed in Section 2.02 of Notice 2006-27 of the Internal Revenue Service. Field inspections of the dwelling unit performed by the undersigned eligible certifier during and after the completion of construction have confirmed that all features of the home affecting such heating and cooling energy consumption comply with the design specifications provided to the undersigned certifier.

Building Features

Ceiling Flat:	R-30	Slab:	None
Vaulted Ceiling:	NA	Duct:	R-6.0
Above Grade Walls:	U-0.051	Window:	U-Value = 0.330, SHGC = 0.450
Foundation Walls:	NA	Air-Source HP:	Electric, Htg: 9.3 HSPF, Clg: 17.5 SEER.
Exposed Floor:	R-30		

Shows that this home Meets
the Tax Credit Criteria

This report provides information useful in determining whether the home qualifies for Energy Efficiency Tax Credits. It is not valid for tax purposes, as homes must be inspected and approved by a certified HERS rater in order to qualify.

PERFORMANCE SUMMARY - 2004 IECC

Date: Rating No.:
 Building Name: Rating Org.:
 Owner's Name: Phone No.:
 Property: Rater's Name:
 Address: Rater's No.:
 Builder's Name:
 Weather Site: Rating Type:
 File Name: Rating Date:

The new home as built
 compared to an IECC
 2004 home in REMRate

	REFERENCE			DIFF	% DIFF
Annual Load (MMBtu/yr)					
Heating	14.7	8.1	5.6	38.1%	
Cooling	31.7	30.0	1.7	5.4%	
Water Heating	12.2	8.9	3.4	27.5%	
Annual Consumption (MMBtu/yr)					
Heating	24.1	11.8	12.3	51.1%	
Cooling	11.2	8.1	3.0	27.0%	
Water Heating	15.1	10.8	5.3	32.6%	
Lights & Appliances	19.0	18.7			
Photovoltaics	-0.0	-0.0			
Total	70.0	50.4	20.6	29.0%	
Annual Energy Cost (\$/yr)					
Heating	\$ 400	\$ 189	\$ 201	50.3%	
Cooling	\$ 317	\$ 231	\$ 86	27.0%	
Water Heating	\$ 263	\$ 177	\$ 86	32.6%	
Lights & Appliances	\$ 560	\$ 560	\$		
Photovoltaics	\$ -0	\$ -0	\$		
Service Charges	\$ 0	\$ 0	\$		
Total	\$ 1539	\$ 1167	\$ 373	24.2%	
Design Loads (kBtu/hr)					
Space Heating	21.6	23.6	-2.0	-9.4%	
Space Cooling	18.1	17.6	0.4	2.4%	

Utility Rates:
 Electricity: 2008 elec Sou .0972
 Gas: Gas state 2008 1.631

Enter on Cover Sheet
 "Reference Home Mmbtu"

Enter on Cover Sheet
 "As Built Mmbtu"

ECONOMIC SUMMARY - 2004 IECC

Date: April 16, 2010 Rating No.:
 Building Name: Rating Org.: comp
 Owner's Name: Joe Smith Phone No.: 987-654-3210
 Property: 123 Example Street Rater's Name: Joe Rater
 Address: New Orleans, LA 70126 Rater's No.: ERHL 2000-026
 Builder's Name: Eddie Beard, LLC
 Weather Site: New Orleans, LA Rating Type: Confirmed Rating
 File Name: E.Beard4045AthisCtBLGF.blg Rating Date: 1-24-08

Run the Economic Summary 2 bldg Report to the 2004 IECC

Simple Payback (yrs): 36

First Year Savings (\$):

Heating	184
Cooling	130
Water Heating	11
Lights & Appliances	13
Photovoltaics	0
Service Charges	0
Total	338

Assumptions:

Improvement Cost (\$) \$ 12000
 Interest Rate (%) 8.0
 Loan Term (yrs) 20

Always \$12,000

Does not matter

First Year Cost 1222
 Net Saving -885

Present Value of Savings (\$):

Heating	2292
Cooling	1617
Water	135
Lights & Appliances	163
Photovoltaics	0
Service Charges	0
Total	4207

Assumptions:

Improvement Cost (\$) \$ 12000
 Discount Rate (%) Always 5 → 5.0
 Fuel Escalation Rate (%) Always 0 → 0.0
 Improvement Life (yrs) Always 20 years → 20
 on New Homes

EEP equals Total

"Energy Efficiency Premium"

"Cost of Energy Savings"

"Present Value of Energy Savings"

Improvement Cost 12000
 Net Savings -7793

Differences

From
 REFERENCE

To

E.Beard4045AthisCtBLGF
 R-30 unvented Attic U=0.032
 SIP 3-5/8" U=0.051
 Fiberglass Door U=0.268

Ceiling w/Attic N/A U=0.035
 Frame Walls N/A U=0.082
 Doors N/A U=0.750

REM/Rate - Residential Energy Analysis and Rating Software v12.83

This information does not constitute any warranty of energy cost or savings.
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Windows	UDRH Std U=0.750	DbI/LoE/Arg - Vinyl U=0.330
Frame Floors	N/A U=0.257	R-30 U=0.034
Ducts	NA	R-6.0 Conditioned space
Duct Leakage	NA	0.00 CFM @ 50 Pascals
Mechanical Equipment List	ASHP: Htg: 59.3 kBtuh, 7.7 HSPF. Clg: 20.8 kBtuh, 13.0 SEER.	ASHP: Htg: 41.1 kBtuh, 9.3 HSPF. Clg: 24.0 kBtuh, 17.5 SEER.
	Water Heating: Conventional, Elec, 0.89 EF.	Water Heating: Conventional, Elec, 0.92 EF.
Infiltration	Htg: 0.00048 Clg: 0.00048 SLA	Htg: 1250 Clg: 1250 CFM50
Infilt. Measure	Blower door test	Blower door test

DRAFT

Run the Economic Summary 2 bldg Report
comparing the New Home to the 2004 IECC

ENERGY COST AND FEATURE REPORT - 2004 IECC

Date: April 16, 2010

Rating No.:

Run the Energy Cost & Feature 2 bldg Report
comp: to the 2004 IECC

Building Name:

Rating Org.:

Owner's Name: Joe Smith

Phone No.: 987-654-3210

Property: 123 Example Street

Rater's Name: Joe Rater

Address: New Orleans, LA 70126

Rater's No.: ERHL 2000-026

Builder's Name: Eddie Beard, LLC

Rating Type: Confirmed Rating

Weather Site: New Orleans, LA

Rating Date: 1-24-08

File Name: E.Beard4045AthisCtBLGF.blg

REFERENCE E.Beard4045AthisCtBLGF

DIFF % DIFF

ANNUAL ENERGY COSTS

Heating	\$	224	\$	40	\$	184	82.0%
Cooling	\$	283	\$	153	\$	130	45.8%
Water Heating	\$	251	\$	240	\$	11	4.3%
Lights & Appliances	\$	456	\$	443	\$	13	2.9%
Photovoltaics	\$	-0	\$	-0	\$		
Service Charges	\$	0	\$	0	\$		
Total	\$	1215	\$	877	\$	338	27.8%
Average Monthly	\$	101	\$	73	\$	28	27.8%

Estimated Annual Pre-Improvement
Energy Cost Goes on Form 1119

Estimated Annual Post-Improvement
Energy Cost Goes on Form 1119

Estimated Annual Energy
Savings Goes on Form 1119

ENERGY FEATURES

Ceiling w/Attic:	N/A U=0.035	R-30 unvented Attic U=0.032
Vaulted Ceiling:	None	
Above Grade Walls:	N/A U=0.082	S/P 3-5/8" U=0.051
Foundation Walls (Cond):	None	
Found. Walls (Uncond):	None	
Doors:	N/A U=0.750	Fiberglass Door U=0.18
Windows:	UDRH Std U=0.750	DbI/LoE/Arg - Vinyl U=0.330
Frame Floors:	N/A U=0.257	R-30 U=0.034
Slab Floors:	None	
Infiltration:	Htg: 0.00048 Clg: 0.00048 SLA	Htg: 1250 Clg: 1250 CFM50
Infil. Measure:	Blower door test	
Mechanical Ventilation:	None	Balanced: HRV, 111 cfm, 1.3 watts.
Interior Mass:	Tile	
Mech Equip List:	ASHP: Htg: 59.3 kBtuh, 7.7 HSPF. Clg: 20.8 kBtuh, 13.0 SEER.	ASHP: Htg: 41.1 kBtuh, 9.3 HSPF. Clg: 24.0 kBtuh, 17.5 SEER.
	Water Heating: Conventional, Elec, 0.89 EF.	Water Heating: Conventional, Elec, 0.92 EF.
Programmable Thermostat:	Heat=No; Cool=No	
Ducts:	NA	R-6.0 Conditioned space
Duct Leakage:	NA	0.00 CFM @ 50 Pascals
Lights/Appliances:	Defaults	
Active Solar:	None	

REM/Rate - Residential Energy Analysis and Rating Software v12.83

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ENERGY COST AND FEATURE REPORT - 2004 IECC

E.Beard4045AthisCtBLGF.blg

Page 2

Photovoltaics: None

Sunspace: No

Notes: Where feature level varies in home, the dominant value is shown. Only changed features are shown for Bldg 2.

DRAFT



**Run the Energy Cost & Feature 2 bldg Report
comparing the New Home to the 2004 IECC**



EmPower Louisiana
LOUISIANA DEPARTMENT OF NATURAL RESOURCES

HERO Program

HVAC Equipment Forms

Assigned with
Preliminary fund
allocation and follows
through with Final

CO#

CO#123456

Provide make, model, & serial number for all new building heating, ventilating, cooling and hot water equipment installed after the preliminary audit. Provide a separate list for Energy Star® and non-Energy Star® equipment. This information is required for verification purposes. It must be legible. (If you need additional room, complete the list on a blank piece of paper.)

New Energy Star® HVAC Equipment List	Qty	Make	Model	Serial Nos.
Water Heaters				
Gas Storage Water Heaters				
Gas Condensing Water Heaters				
Gas Tank-less Water Heaters				
Air Conditioners				
Room Air Conditioners				
Central Air Conditioners				
Heat Pumps				
Electric Heat Pumps				
Air Source Heat Pumps				
Gas Furnaces				
Other				

Fill out the Make, Model, and Serial
Numbers for all New Energy Star
Equipment that is installed in the New
Home and is called out on this list



Assigned with
Preliminary fund
allocation and follows
through with Final

CO#:

CO#123456

New NON-Energy Star® HVAC Equipment List	Qty	Make	Model	Serial Nos.
Water Heaters				
Gas Storage Water Heaters				
Gas Condensing Water Heaters				
Gas Tank-less Water Heaters				
Air Conditioners				
Room Air Conditioners				
Central Air Conditioners				
Heat Pumps				
Electric Heat Pumps				
Air Source Heat Pumps				
Gas Furnaces				
Other				

Numbers for all **New Non-Energy Star**
Equipment that is installed in the New

Home and is called out on this list